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Foreign

CROPS AND MARKETS



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UNITED STATES DEPARTMENT OF AGRICULTURE

OFFICE OF FOREIGN AGRICULTURAL RELATIONS

WASHINGTON 25, D.C.

WHEAT ALLOCATIONS ENDED

The following announcement was released on April 19 by the Food and Agriculture Organization of the United Nations:

"Immediate deallocation of wheat and wheat flour was announced today by the International Emergency Food Committee of the FAO Council. The action was taken by IEFC on the recommendation of its Committee on Cereals. The action is effective at once. The functions of the Committee on Cereals are also discontinued as of today.

In recommending immediate deallocation of wheat and wheat flour--the remaining cereals in addition to rice under international allocation--the Committee on Cereals took account of the approximate balance in 1948-49 between world wheat supplies and import requirements as measured by ability to pay for wheat imports. Looking ahead to the 1949-50 season, the Committee noted particularly the reserve stocks of wheat and coarse grains in North America and the favorable April crop report for winter wheat in the United States of America."

This action brings to an end the activities of a Committee whose efforts were directed toward achieving an equitable distribution of available supplies of cereals during the critical postwar emergency period.

FOREIGN CROPS AND MARKETS

Published weekly to inform producers, processors, distributors and consumers of farm products of current developments abroad in the crop and livestock industries, foreign trends in prices and consumption of farm products, and world agricultural trade. Circulation of this periodical is free, but restricted to those needing the information it contains for the conduct of their production, marketing, educational, news dissemination and other related activities. Issued by the Office of Foreign Agricultural Relations of the United States Department of Agriculture, Washington 25, D. C.

WORLD SHEEP NUMBERS RISE 1/

World sheep numbers, estimated at 720 million head at the beginning of 1949, continued to increase for the second consecutive year, according to the Office of Foreign Agricultural Relations. These numbers are about 5 million head above the preceding year, but 20 million head, or 3 percent, below the 1936-40 prewar average. The generally improved grazing conditions and higher prices received for wool, mutton and lamb have encouraged expansion of flocks in some of the major sheep-producing areas of the world.

Although sheep numbers increased in many of the important producing countries, the principal gains occurred in Australia, Turkey, Spain, Rumania, the United Kingdom and the Soviet Union. These gains more than offset the declines that took place in the United States, Argentina and China. Notwithstanding the increases, sheep number in Australia and most of the European and African countries continue to be below the 1936-40 prewar average. On the other hand, numbers in the United States, the United Kingdom and Rumania are the lowest in many years and are now 38, 26, and 19 percent, respectively, below their prewar levels.

Factors which have affected sheep production varied with the respective producing countries. Numbers in Canada and the United States have fallen off largely because of more profitable alternative agricultural enterprises. A similar situation, together with inadequate market outlets, has caused numbers to decline in Argentina.

Recovery of sheep numbers in the United Kingdom has been retarded by the further development of the dairy industry, which competes for grasslands and fodder crops. More favorable grazing conditions and increased demand for wool, and to a lesser extent, for mutton and lamb, contributed to the sizable increases in Australia, Turkey, Spain and the Soviet Union, while the effects of war reduced numbers in China and Greece. Generally, inadequate grazing throughout the year and unfavorable weather conditions at time of lambing have slowed recovery in other sheep-producing areas of the world.

Further recovery of world sheep numbers will depend principally on favorable growing conditions and greater economic returns from sheep farming in relation to other farm enterprises. Profitableness of the sheep business is the factor that will determine whether producers in Canada, Argentina and the United States will expand their flocks. In the principal wool-producing countries, the price of wool will be the deciding factor as to whether or not herds are expanded, while in other countries, the price of mutton and lamb and the domestic need for wool will be the determining factor in increasing numbers.

This is one of a series of regularly scheduled reports on world agricultural production, approved by the Office of Foreign Agricultural Relations Committee on Foreign Crops and Livestock Statistics. For this report the committee was composed of Joseph A. Becker, Chairman, C. M. Purves, Elmer A. Reese, Hazel B. Kefauver, Karen J. Friedmann, and Dwight R. Bishop.

(Table on following pages)

1/ A more extensive statement may be obtained from the Office of Foreign Agricultural Relations.

SHEET: Numbers in specific countries, 1931-35 and 1936-40, annual 1944-1949

Continent and country	Month of estimate 1/	Average		1934	1945	1946	1947	1948 2/	1949 2/
		1931-35	1936-40						
<u>NORTH AMERICA</u>									
Canada.....	Dec. 1 1/3/	2,762	2,651	2,733	2,632	2,456	1,782	1,587	-
Guatemala.....	July 1 1/4/	3,674	2,573	3,688	2,704	1,754	1,424	618	1,322
Mexico.....	Jan. 1 1/5/	51,100	51,404	50,782	46,520	42,476	37,818	34,827	-
United States.....	Jan. 1 1/6/	60,200	59,700	59,000	54,900	50,600	45,400	42,300	31,963
Estimated total.....									39,000
<u>EUROPE</u>									
Albania.....		1,503 3/	1,576	1,700	1,600	1,700	-	-	-
Austria.....	Dec. 3 1/4/6/	265 3/	316	144	460	391	399	474	454
Balutin.....	Jan. 1 1/4/	187 3/	157	213	191	177	144	107	113
Bulgaria 7/.....	Dec. 31 1/4/	2,185	8,746	8,600	7,100	7,800	8,784	-	-
Croatia 8/.....	Jan. 1 1/4/	3/	492	519	560	510	490	386	459
Denmark.....	July 15 1/	179 3/	147	203	213	213	91	77	-
Egypt.....		3,233	3,076	2,663	2,581	2,423	2,094	2,058	-
Finland.....	June	973 3/	1,007	965	1,015	1,095	982	999	-
France.....	Mar. 1 1/2/	9,973 3/	9,648 3/	10/	6,715 10/	6,390 10/	6,632	7,259	7,457
Germany 11/.....	Fall 1 1/	9,832 3/	9,729	10/	4,449	10/	2,018	2,988	3,150
Greece.....	Dec. 1 1/	7,227 3/	8,364	10/	-	-	6,262	7,205	7,056
Iceland.....	Dec. 31 1/	1,204	1,490	1,199	1,199	1,199	370	438	7,000
Italy.....	Spring	666	624	532	532	532	-	591	-
Iraq.....	July 1 1/10/	10/	9,453 6/	9,453 6/	9,453 6/	9,453 6/	9,453 6/	9,453 6/	-
Netherlands.....	July 1 1/	664	636	636	636	636	636	636	625
Norway.....	June	1,725	1,762	1,795	1,760	1,707	1,693	1,629	-
Poland 12/.....	June 30 1/	14/	1,941	10/	710 10/	759 10/	981	1,046	-
Portugal.....	Dec. 31 1/13/	3,274 3/	3,948	3,700	3,500	3,900	4,000	4,000	-
Romania 12/.....	Dec. 31 1/15/	9,756 3/	9,756 3/	10/	-	6,799	7,100	-	-
Spain.....	Dec. 31 1/2/	11,982 3/	20,107	24,310	22,000	20,183	482	421	22,000
Sweden.....	Summer	592	598	598	598	598	-	-	349
Switzerland.....	April	185 3/	177	209	193	195	182	170	-
United Kingdom.....	June	26,017	26,117	20,107	20,150	20,358	16,713	18,164	-
Yugoslavia.....	Dec. 31 1/	16,125,900	123,400	108,700	100,200	100,900	101,900	105,800	109,500
Estimated total.....									
Soviet Union 12/.....	Jan. 1	-	4/	66,000	-	-	61,100	60,800	64,800
<u>ASIA</u>									
Cyprus 11/.....	March	290	300	303	331	315	-	-	-
Iran.....	Mar. 21	14,666	14,497	13,730	13,020	12,950	13,190	13,000	-
Iraq.....	Jan.	6,655 3/	7,090	6,000	7,250	8,000	-	-	9,000
Palestine 12/.....	Spring	218	14/	299	-	-	-	-	-
Syria.....	Dec. 31 1/	-	2,056	2,216	2,777	3,091	3,260	3,176	-
Turkey.....	Dec. 31 1/4/	13,593 3/	21,656	21,205	22,450	23,386	23,387	-	-
British Malaya 18/.....	May	228	339	10/	-	-	152	175	-
China 19/.....	May	30,000	26,000	21,000	21,000	20,000	-	22,000	-
India.....	Dec. 31 1/	43,347	43,256	43,256	48,000	49,000	50,000	50,000	-
Netherlands Indies.....	Dec. 31 1/4/	1,684 3/	1,614	-	-	-	-	1,610	-
Estimated total.....		143,200	147,100	142,500	146,500	148,900	152,000	152,900	151,100

SOUTH AMERICA			
Argentina	July	40,566	3/ 44,900
Bolivia	Dec. 31	5,226	2,408
Brazil	July	11,673	3/ 11,000
Chile	June	6,083	5,855
Colombia	Dec. 31	953	916
Ecuador	Dec. 31	2/ 1,500	-
Paraguay	Dec. 31	191	159
Peru	Dec. 31	12,000	14,900
Uruguay	April	11,932	4/ 17,931
Estimated total		96,700	100,900

AFRICA			
Algeria 1/	Nov. 1	5,578	6,180
Anglo-Saxon Sudan	3/	2,310	3/
Kenya	Dec. 31	3/ 2,210	3/ 3,274
Tanganyika	Dec. 31	1,884	1,780
Basutoland	Dec. 31	500	2,900
British Somaliland	June	1,353	3/ 6
Egypt	Dec. 31	7,764	9,976
French Morocco 1/	Dec. 31	8,307	3/ 8,374
French West Africa and Togo	Dec. 31	194	194
Madagascar 1/	Dec. 31	310	310
Southern Rhodesia	Dec. 31	1,156	3/
South West Africa	Dec. 31	593	481
Spanish Morocco 1/	Dec. 31	2,967	3,026
Tunisia	Augst	14,054	39,899
Union of South Africa		96,800	99,500
Estimated total		709,100	740,600

OCEANIA			
Australia	Mar. 31	111,417	112,571
New Zealand	Apr. 30	28,179	31,352
Estimated total		140,300	144,000
Estimated world total		709,100	740,600

1/ End of year estimates (October to December) included under following year for comparisons and totals. Thus, for Canada the December 1943 estimate of 2,733,000 is shown under 1944. 2/ Preliminary. 3/ Average for 2 to 4 years only. 4/ Census or estimate for single year. 5/ Present territory-excludes Sub-Carpathian Russia. 6/ Includes Southern Dobruja, beginning 1944. 7/ Includes Southern Dobruja, beginning 1944. 8/ Present territory-excludes Sub-Carpathian Russia. 9/ September. 10/ Official statistics; may be an underestimate of actual numbers. 11/ Totals for 4 zones of occupation. 12/ Present territory. 13/ Census December 31, 1934. 14/ Census December 31, 1910. 15/ Average for years 1930-39. 16/ Not strictly comparable with later years, due to territorial changes. 17/ Data include only number taxed. 18/ Data included in 1940. 19/ Includes China Proper (22 provinces), Manchuria, Jehol, and Sinkiang (Turkestan). 20/ The Census of May 10-12, 1947, reported 50,856,566 sheep on farms. 21/ Year 1929.

Office of Foreign Agricultural Relations. Prepared or estimated on the basis of official statistics of foreign governments, reports of U.S. Foreign Service officers, and other information. Data relate to present boundaries, unless otherwise noted. Totals include estimates for countries for which official statistics are unavailable.

EXPORTS OF PALM OIL AND PALM KERNELS INCREASE IN 1948 1/

There was a marked increase in the exports of palm oil and palm kernels from producing areas in 1948 over those of 1947, and it appears that the world production of these important vegetable-oil products from the tropics is rapidly approaching the levels of prewar years.

Palm Oil

Exports of palm oil from the major palm oil producing countries of the world are estimated to have been 429,000 short tons in 1948. This estimate, derived from data received recently, is 40 percent higher than the tonnage exported in 1947. It is less by one-fifth, however, than the average quantity exported in the prewar period 1935-39.

Palm oil exports in 1949 may sharply exceed shipments in 1948. Present indications are that the volume entering international trade in 1949 may be somewhere between 535,000 and 580,000 tons. This would be an increase of 25 to 35 percent over the quantity exported in 1948. The increase in 1949 exports over those of 1948 from Africa may be about 32,000 tons. Malayan exports may be up 3,000 tons. Indonesia's increase, the greatest in both absolute and relative terms, may be somewhere between 70,000 and 115,000 tons.

Africa and the Far East are the areas in which exportable supplies of palm oil, and palm kernels as well, originate. Africa supplied half of the world's palm oil exported in prewar years. The Far East, specifically British Malaya and Indonesia, supplied the remaining half. During war years Africa became virtually the sole source of palm oil when the Japanese occupied British Malaya and Indonesia in 1942 and promptly cut off all shipments. African supplies throughout the war and part of the postwar period were regulated rigidly by the European countries controlling the producing areas. This prevented supplies from becoming generally available to world markets.

The palm oil industry in both British Malaya and Indonesia suffered seriously from the 3-year occupation by the enemy. Exports of palm oil from Malaya, which prior to the war was the source of 10 percent of all exports, surpassed prewar levels in both 1947 and 1948. Such is not the case with respect to Indonesia which, in the 1935-39 period, was the source of 40 percent of all exports. Since World War II, civil and military disturbances, which have postponed complete recovery of the palm oil industry in Indonesia, have held production and exports at levels far below prewar. Only in those territories presently controlled by the Dutch is it known that the oil palm plantations are being rehabilitated as quickly as possible. Little is known of the status of the plantations in territory controlled by the Indonesian Republicans. Probably not until all of the plantations are rehabilitated will Indonesia regain its former prominence as a world source of palm oil.

1/ The palm oil and palm kernel situation is reviewed here in terms of exports, rather than production, owing to the availability of more complete data regarding the former. A more extensive statement may be obtained from the Office of Foreign Agricultural Relations.

PALM OIL: Exports from principal producing countries,
average 1935-39, annual 1946-48

(Short tons)

Country of origin	Average 1935-39	1946	1947	1948 1/
Africa:				
Belgian Congo.....	72,450	96,658	93,624	121,680
Sierra Leone.....	1,943	100	2/	2/
French Equatorial Africa.....	6,314	1,490	2,837	2,415
French Cameroons.....	9,754	1,711	1,128	3,000
Dahomey.....	3/21,106	628	783	(
French Guinea.....	3/ 240	2/	2/	4/(6,575
Ivory Coast.....	3/ 3,285	151	2	(
French Togo.....	1,842	10	851	1,197
Gold Coast.....	549	185	205	400
Liberia.....	1,245	495	1,237	1,300
Nigeria.....	153,890	112,990	141,068	184,312
Angola.....	3,254	16,716	13,646	11,000
Portuguese Guinea.....	950	1,200	1,069	1,000
Total Africa.....	276,912	232,334	256,450	332,879
British Malaya.....	47,360	9,312	50,771	54,668
Indonesia.....	212,685	2/	1,728	41,040
Total 5/.....	536,957	241,646	308,949	428,587

1/ Preliminary estimate.

2/ No exports indicated.

3/ Average 1934-38.

4/ Total French West Africa; colony distribution not available.

5/ Revised.

Compiled from official sources. Office of Foreign Agricultural Relations - Fats, Oils and Rice Division.

PALM KERNELS: Exports from principal producing countries,
average 1935-39, annual 1946-48.

(Short tons)

Country of origin	Average 1935-39	1946	1947	1948 1/
Africa:				
Belgian Congo.....	72,450	57,170	53,310	91,904
Gambia.....	776	1,212	1,344	1,400
Sierra Leone.....	83,775	52,600	70,532	70,600
French Equatorial Africa.....	14,283	8,392	10,260	8,438
French Cameroons.....	39,470	28,791	28,578	33,775
Dahomey.....	56,700	24,300	28,344	37,100
French Guinea.....	17,500	8,646	13,439	8,900
Ivory Coast.....	10,300	4,612	1,207	12,150
Senegal.....	2,700	1,429	1,122	1,450
French Togo.....	13,775	3,151	5,137	6,990
Gold Coast.....	7,987	6,667	4,106	6,000
Liberia.....	10,130	974	3,939	4,000
Nigeria.....	369,292	310,512	354,341	382,776
Angola.....	6,678	14,309	14,308	13,000
Portuguese Guinea.....	13,400	14,560	20,000	15,000
Total Africa.....	719,218	537,325	609,670	693,483
British Malaya.....	8,132	175	5,874	7,249
Indonesia.....	44,134	2/	1,758	10,850
Total.....	771,462	537,500	617,302	711,582

1/ Preliminary.

2/ No exports indicated.

Compiled from official sources. Office of Foreign Agricultural Relations - Fats, Oils, and Rice Division.

The principal sources of African palm oil exports are the two colonies Nigeria and the Belgian Congo. Their combined shipments in prewar years comprised over two-fifths of world exports.

Nigeria's exports in 1948, half again as large as those of the Belgian Congo, are estimated at 184,300 tons. Representing an increase of nearly one-third over the quantity exported in 1947, this tonnage exceeded the prewar average by one-fifth. Results of efforts by the Nigerian Government to increase production in this colony, where by far the dominant share of total output comes from wild palms harvested by the natives, may contribute materially to an increase in the supplies exported in 1949. Total exports of 200,000 tons are probable.

Palm oil exports from the Belgian Congo last year totaled 121,700 tons. This was 30 percent more than the quantity shipped out in 1947, and 70 percent over the tonnage exported in 1935-39. In the Congo, wartime and subsequent efforts to expand production of palm oil through plantings on new areas are bringing favorable results. A predicted increase in production, 11 percent over last year's output, probably should permit exports in 1949 totaling 138,000 tons. This would be about 13 percent more than total shipments in 1948.

Exports from the remaining 10 palm oil exporting countries of Africa (see table) totaled 26,800 tons in 1948. This represents a gain of nearly one-fourth from the year before when only 21,800 tons were exported. In comparison with prewar, shipments in 1948 were only a little more than half as large. It is assumed that, as a whole, exports in 1949 from the 10 countries indicated will not be materially above the levels of last year. Increases in some probably will be offset by decreases in others.

Exports from the Far East in 1948 were up more than 80 percent from the year before. Shipments from British Malaya last year totaled 54,700 tons, 8 percent more than the tonnage exported in 1947. Exports in both 1947 and 1948 exceeded the Malayan prewar level. The relatively high export levels in the last 2 years are regarded by some authorities as a true reflection of the degree to which the Malayan palm oil industry has been rehabilitated. Since the palm oil industry is situated favorably when compared to other industries in Malaya, it appears that exports in 1949 may exceed those in 1948 by as much as 3,000 tons or approximately 5 percent.

Supplies of palm oil exported from Indonesia in 1948 totaled 41,000 tons. This abnormally small quantity, though greater than the 1,728 tons shipped out in 1947, was only one-fifth as great as exports in prewar years. Results of intensive efforts to rehabilitate the plantations in the unoccupied areas of Indonesia are expected to become apparent this year. Estimates of exports in 1949, as made by official and trade representatives, vary considerably. It is highly probable that Indonesian exports in 1949 may be somewhere between 110,000 and 155,000 tons, an exceptionally sharp increase over shipments in 1948.

Palm Kernels

Exports of palm kernels, like palm oil, were considerably higher in 1948 than in 1947. An estimated 711,600 short tons was shipped from major producing countries last year. This quantity exceeded total shipments in both 1946 and 1947 by 15 and 32 percent, respectively. Despite marked increases in postwar exports, shipments in 1948 were still 8 percent below prewar levels.

Africa is the source of almost all palm kernels entering world trade. Prewar exports from Africa comprised 93 percent of total shipments. From 1946 to 1948 the proportion varied from virtually 100 to 97 percent. Shipments from the Far East - from British Malaya and Indonesia - comprised the small remainder.

Three colonies - Nigeria, the Belgian Congo, and Sierra Leone - normally supply the bulk of the kernels exported from Africa. In 1948 nearly four-fifths of the total quantities exported from that continent came from the above three colonies.

Exports of palm kernels from Nigeria in 1948 totaled 382,800 tons. This quantity, the greatest in any of the postwar years, exceeded shipments in 1947 by 8 percent and was 4 percent above the prewar average.

Shipments of kernels from the Belgian Congo in 1948 comprised a total of 91,900 tons. This represents a sharp increase, nearly 75 percent, over the quantity exported in 1947 and was more than one-fourth above the prewar export level.

Sierra Leone's exports of palm kernels in 1948 are estimated at 70,600 tons. Virtually the same as the quantity exported in 1947, the volume in 1948 was less than the average of prewar years by one-sixth.

The combined exports from the remaining 12 palm kernel exporting countries in Africa (see table) totaled 145,200 tons in 1948. This was 12 percent greater than the quantity shipped in 1947 but was below the prewar average by nearly one-fourth.

Total shipments of kernels from the Far East - British Malaya and Indonesia - are of minor importance when compared with those from Africa. Shipments from the Far East comprised 3 percent of the total volume exported in 1948 and in prewar years they comprised 7 percent.

(Continued on Page 404)

COMMODITY DEVELOPMENTS

GRAINS, GRAIN PRODUCTS AND FEEDSWHEAT AGREEMENT GOES TO U.S.
SENATE; SIGNED BY 41 COUNTRIES

The recently negotiated International Wheat Agreement, signed by 41 countries as of the closing date of April 15, has been submitted to the United States Senate for consideration as a treaty.

At the conclusion of the International Wheat Conference 42 countries (37 importers and 5 exporters) indicated an intention of signing the Agreement. All of these countries except Paraguay had signed by the closing date. At the time of signing, however, Peru reduced its guaranteed purchases from 200,000 to 150,000 metric tons.

The net effect of these two actions is a reduction of 110,000 metric tons--4 million bushels--in the total guaranteed purchases of 456 million bushels involved in the Agreement. Unless other participating importing countries are willing to raise their guaranteed purchases by an offsetting amount, it will be necessary to make a slight reduction in the guaranteed sales of exporting countries. Final adjustment of the quantities involved will be made at the July meeting of the International Wheat Council, provided a sufficient number of participating countries have formally accepted the Agreement by that time.

DECLINE IN ARGENTINE
CORN EXPORTS

Corn exports from Argentina during the crop year just ended in that Southern Hemisphere country were 28 percent lower than last year and still far below the average prewar shipments, according to latest unofficial reports available to the Office of Foreign Agricultural Relations. Corn exports declined from 2,853,000 metric tons (112,316,000 bushels) in 1947-48 to 2,040,000 metric tons (80,319,000 bushels) in 1948-49. This compares with the 1934-35/1938-39 prewar average of 6,398,000 metric tons (251,858,000 bushels). Thus, exports of this feed grain during the past year are only 32 percent of the average prewar shipments.

Except for most recent years, Argentina has long been the world's leading exporter of corn and a primary source of supplemental feeds for the large numbers of livestock in northwestern Europe. The Argentine corn crop year extends from April 1 until March 31 of the following year.

Of the countries to which Argentine corn was shipped during the past crop year, the United Kingdom alone accounted for 1,221,000 metric tons (48,072,000 bushels) or 60 percent of the total. (See table). Other important destinations included Germany, Netherlands, Belgium, Spain, France, India and Italy.

Argentina: Monthly corn exports by countries of destination,
crop year April-March 1948-19 1/
(In metric tons of 2,000 pounds each)

Destination	April	May	June	July	August	Sept.	Oct.	Nov.	Dec.	Jan.	Feb.	March	Total
Belgium	8,673	1,540	9,450	-	-	-	6,000	4,264	12,158	31,899	25,525	20,315	115,611
Finland	-	-	2,643	-	-	-	5,485	-	-	-	-	-	20,234
France	27,220	12,054	4,091	1,292	-	1,458	13,170	7,953	6,700	1,530	-	-	75,471
Germany	-	-	40,677	121,815	22,512	-	-	-	-	-	-	-	185,034
Italy	19,700	-	1,578	-	-	-	-	-	-	-	-	-	152,166
Netherlands	1,813	-	-	36,994	25,330	19,482	16,328	6,463	398	26,768	18,131	1,939	156,949
Portugal	-	-	5,000	-	-	-	-	-	-	-	-	-	5,000
Spain	13,762	424	13,812	4,011	-	-	37,027	5,586	11,003	5,490	6,771	-	91,422
Sweden	-	-	-	-	-	-	-	-	-	-	13,607	6,393	20,000
Switzerland	-	-	-	-	-	-	-	-	-	-	-	-	8,682
United Kingdom	42,236	64,959	55,291	21,618	114,933	103,426	195,288	300,167	209,955	94,918	14,928	3,073	1,221,095
Barbados	-	-	-	182	-	-	-	120	-	-	-	-	302
Uruguay	2,700	-	-	-	-	2,160	-	-	-	-	-	-	4,860
India	-	-	-	-	-	-	-	-	-	13,810	6,190	-	50,000
Japan	-	-	-	19,542	8,839	-	-	-	-	-	-	-	28,381
Egypt	-	-	-	-	-	-	-	-	7,370	13,629	-	-	20,999
French Morocco	-	-	-	-	-	-	-	4,000	-	-	-	-	4,000
Total	115,664	80,977	132,578	205,392	171,796	126,520	27,231	352,535	252,056	226,044	81,661	41,808	2,010,206

1/ Unofficial source.

Argentina: Corn Exports, by months, average 1934-35 to
1938-39, annual 1945-46 to 1948-49 ^{1/}

(1,000 metric tons of 2,204.6 pounds each)

Month	Average	1945-46	1946-47	1947-48	1948-49
	1934-35 to				
	1938-39				
July.....	616	48	341	115	205
August.....	624	34	307	157	172
September.....	710	34	233	195	126
October.....	649	22	190	339	273
November.....	586	65	184	495	333
December.....	507	109	87	488	252
July-December.....	3,692	312	1,342	1,789	1,361
January.....	498	110	104	314	226
February.....	341	145	101	301	82
March.....	276	106	96	207	42
April.....	429	116	125	105	
May.....	553	232	70	81	
June.....	551	148	47	133	
January-June.....	2,648	857	543	1,141	
July-June.....	6,340	1,169	1,885	2,930	

^{1/} Official data prior to June 1948, unofficial trade statistics for period June 1948, to date.

The average monthly shipments of corn from Argentina from April to August 1948 were 35 percent higher than in the corresponding months of 1947. During September to March 1948-49, however, these shipments averaged 43 percent lower than the same period in the previous year. The net effect, of course, was that the total 1948-49 shipments were 28 percent lower than in 1947-48. This falling off of Argentine exports reflected, in part, the news of extremely good prospects for the United States' corn crop. The possibility of lower prices for corn combined with increased export availabilities from the United States also contributed to the decline.

March 1949 shipments of corn from Argentina totaled only 20 percent of the corresponding figure a year ago, and were the smallest for any month since October 1945.

The year of highest exports of corn from Argentina was 1931, when 9,767,000 metric tons (381,514,000 bushels) were exported. The lowest exports during the 20-year period 1920-39 amounted to 2,642,000 metric tons (104,016,000 bushels) in 1938--a total that has not been exceeded since that time. The average exports of corn for the 20-year period was 5,374,000 metric tons (211,546,000 bushels).

(Continued on Page 390)

FATS AND OILS

WORLD LARD PRODUCTION REACHES POSTWAR PEAK IN 1948 1/

World production of lard, including unrendered pork fats, in 1948 was estimated at 2.4 million short tons. The output in 1948, the highest since the war, was only slightly above the 1947 production and approximately 13 percent below the production in the prewar years 1935-39. The Western Hemisphere produced almost twice as much lard as Europe. Lard production increased in most countries since the war, but total world production was affected mainly by a 350,000-ton increase above the 1935-39 average in the United States.

The United States is the world's largest producer of lard and in 1948 produced 1,165,000 tons or 49 percent of the world total. The postwar peak production was in 1947 with 1,213,500 tons which was almost 50 percent above 1935-39 and 4 percent higher than production in 1948. An increase in hog slaughtering with an accompanying increase in animal-fat production is in prospect for 1949. The greater output of both lard and grease is expected as a result of an 8 percent increase in the 1948 fall pig crop and a probable increase of 10 percent or more in the 1949 spring pig crop. Lard output in the summer and fall of 1949 probably will be substantially greater than a year earlier.

1/ A more extensive statement may be obtained from the Office of Foreign Agricultural Relations.

LARD (including unrendered pork fats): Estimated world production by specified countries, average 1935-39, annual 1946-48

Continent and country	Average 1935-39	1946	1947	1948
	1,000 short tons	1,000 short tons	1,000 short tons	1,000 short tons
<u>NORTH AMERICA</u>				
Canada.....	21.7:	21.4:	32.2:	27.0
Mexico.....	25.0:	35.3:	38.7:	39.0
Nicaragua.....	1/	2.0:	2.1:	2.1
United States.....	815.0:	1,069.0:	1,213.5:	1,165.0
Cuba.....	310:	4.0:	5.0:	5.0
Dominican Republic.....	1/	3.0:	3.3:	2.5
Total 2/.....	877.7:	1,139.7:	1,299.8:	1,245.6:
	:	:	:	:
<u>EUROPE</u>				
Austria.....	15.0:	17.0:	19.0:	22.0
Belgium.....	23.0:	11.0:	12.0:	13.0
Bulgaria.....	11.0:	7.0:	8.8:	9.0
Czechoslovakia.....	48.0:	35.0:	44.3:	35.1
Denmark.....	19.8:	13.2:	13.2:	12.0
Finland.....	3.5:	1.1:	1.1:	1.1
France.....	132.0:	88.2:	99.2:	110.2
Western Germany.....	330.0:	85.5:	99.0:	99.0
Greece.....	5.5:	4.1:	4.4:	4.4
Hungary.....	71.5:	49.6:	57.3:	66.1
Ireland.....	7.7:	4.4:	5.5:	5.5
Italy.....	171.0:	95.2:	109.6:	126.7
Netherlands.....	54.0:	14.0:	10.7:	14.0
Norway.....	2.2:	1.0:	1.1:	1.3
Poland (1946 Frontier).....	123.0:	35.0:	41.0:	45.0
Portugal.....	27.0:	20.0:	20.0:	22.0
Rumania.....	39.0:	25.0:	30.0:	30.0
Spain.....	73.0:	22.0:	24.3:	26.5
Sweden.....	10.0:	7.7:	7.7:	7.7
Switzerland.....	7.7:	3.6:	3.9:	4.0
United Kingdom.....	19.0:	13.2:	15.0:	15.0
Yugoslavia.....	75.0:	45.0:	60.0:	60.0
Total (excl. U.S.S.R.) 2/.....	1,298.7:	604.1:	698.1:	744.6
	:	:	:	:
U.S.S.R. (Europe and Asia).....	345.0:	120.0:	130.0:	136.0
	:	:	:	:
<u>ASIA</u>				
China.....	100.0:	80.0:	100.0:	100.0
Manchuria.....	10.0:	10.0:	10.0:	10.0
Japan.....	1.2:	1.0:	1.0:	1.0
Philippine Islands.....	1.0:	1.0:	1.0:	1.0
Total 2/.....	122.2:	97.0:	117.0:	122.0
	:	:	:	:
<u>SOUTH AMERICA</u>				
Argentina.....	10.0:	25.0:	22.0:	25.0
Brazil.....	66.0:	65.0:	69.0:	66.0
Chile.....	2.5:	2.0:	2.5:	2.5
Colombia.....	10.8:	12.4:	11.4:	11.5
Ecuador.....	1.0:	3.1:	4.2:	4.2
Total 2/.....	100.1:	125.5:	129.1:	131.2
	:	:	:	:
<u>AFRICA</u>				
Madagascar.....	1.0:	.2:	.3:	.3
Angola.....	1/	.5:	.5:	.5
Union of South Africa.....	.7:	1.0:	1.0:	1.0
Total.....	1.7:	1.7:	1.8:	1.8
	:	:	:	:
<u>OCEANIA</u>				
Australia.....	1.6:	4.6:	4.7:	4.6
New Zealand.....	.5:	3.0:	4.0:	8.0
Total.....	2.1:	7.6:	8.7:	12.6
	:	:	:	:
Grand total.....	2,747.5:	2,095.6:	2,384.5:	2,393.8

1/ No basis for estimate. 2/ Includes estimates for the above countries for which data are not available and for minor producing countries.

Canada, in comparison with the United States, has not been a large producer or consumer of lard. Canada's commercial production for 1948 is estimated at 27,000 tons. Imports for 1947 are estimated at 6,900 tons. With a carry-over of about 2,000 tons at the beginning and end of the year and considering small exports, the domestic consumption will be approximately 31,000 tons. Lard production increased by over 50 percent, or 10,800 tons, from 1946 to 1947. The 1948 estimated production is down 5,200 tons from the previous year's production.

Estimates of lard production in Mexico indicate a steady increase during the last two decades. In 1948, the output was placed at about 39,000 short tons. This was an increase of nearly 60 percent from the prewar average. Imports of lard, which in recent years have come mainly from the United States, have been declining as domestic production has increased.

Brazil is one of the few Latin American countries that have been self-sufficient lard producers in recent years. Practically all the lard output is in southern Brazil, including the States of Rio Grande do Sul, Sao Paulo, Goiaz, Mato Grosso, and Minas Gerais. In 1948 production was estimated at 68,000 tons. Brazilian production averaged approximately 66,000 short tons annually during 1935-39, but decreased during the succeeding years. In 1943, the output was estimated at only 37,000 tons. By 1946, production had nearly reached the prewar output. The production of lard in Argentina was 25,000 short tons in 1948 compared with the 1947 output of 22,000 tons. Lard processors were required to reserve $\frac{2}{3}$ percent for the local market at the official fixed price, with the balance available for export. Exports in 1948 were over twice the prewar average and 25 percent above 1947 exports. The heaviest shipments in 1948 went to the United Kingdom.

Lard production in most Latin American nations, apart from Argentina, Brazil, and Uruguay, is insufficient to meet local demands. Cuba's lard production in 1948, about 5,000 tons, was far below domestic requirements and there were periods during the year in which there was an acute shortage due to lack of sufficient imports. These shortages stimulated hog slaughter which helped to supply the Cuban need for fats. Frequently whole carcasses, except hams and shoulders, were rendered so that the producer could take full advantage of the high lard prices resulting from the shortage. Cuban imports in 1947 were 39,600 tons, over twice the prewar average imports. Production of lard in Colombia in 1948 was estimated at 11,500 tons. Imports were kept at a minimum by government import controls. Production of lard in Chile is estimated at about 2,500 tons annually, which almost meets domestic requirements. Lard production in Ecuador of 4,200 tons in 1948 was an increase from 3,100 tons in 1945 and production in 1949 is expected to be at or above the level of last year.

European output of lard and unrendered pork fats has increased slowly but steadily since the end of the war, but is still far below the prewar level. The estimated production in Europe in 1948 was 25 percent greater than in 1946, but total imports have decreased, largely because

of smaller takings by the United Kingdom. Hog and lard production in parts of Europe is not dependent upon any one feed crop, such as corn. Grain and potatoes are used more extensively in certain countries, and supplemented with skimmed milk and protein feeds in varying degree. In most of the European countries, unrendered pork fats are more important than "commercial" lard.

The United Kingdom has had an estimated commercial lard output of only 2,200 tons in each of the postwar years, but total hog fats produced are almost 15,000 tons. Lard imports have declined from a high of 91,200 tons in 1945 to 17,200 in 1947. The United States furnished most of the imports in 1947, but in 1948 Argentina was the large supplier.

The production of lard and unrendered pork fat in Western Germany, an estimated 99,000 tons, is still far below prewar levels, but has increased slightly from the wartime low. In 1948 over 29,000 tons of lard were shipped to Germany from the United States. Large quantities of feed are being made available to German hog producers to increase pork and lard production. This should bring about a greater output in 1949.

Italian production of lard and unrendered fat has increased over 15 percent for each of the postwar years since 1946. French production is estimated at about 110,000 tons in 1948. Imports into France, 58,600 tons in 1946, were down to 24,500 tons or less than half in 1947. The United States was the main supplier.

Hog numbers in Hungary bear a relationship to corn production similar to that in the United States. Next to bread, pork and hog fat are the most important items of diet among the lower income groups. Production of lard, which was estimated at 66,100 tons in 1948, has increased each postwar year. In 1947 Hungary exported approximately 57,300 tons of lard. Lard production in Czéchoslovakia, which varies generally with the supplies of available barley, corn and potatoes, is estimated at 35,070 tons in 1948. When there is a shortage of feedstuffs, farmers slaughter even the suckling pigs, and otherwise reduce their hog population by shipping larger numbers to markets. Both Poland and Yugoslavia, normally heavy producers of lard and unrendered hog fats, had an output estimated in 1948 at 45,000 tons and 60,000 tons, respectively. Poland imported lard from both the United States and Argentina in 1948.

Lard is not important in the edible fat supply of Denmark, which exports a substantial part of its lard production to other European countries. Production in 1948, estimated at 12,000 tons, was about 60 percent of the average output of prewar years. Lard was not rationed in Denmark during the war, except on a voluntary basis, but it was often difficult to obtain. However, in October 1948, it was placed under a rationing system.

The Soviet Union has the largest lard output of any country in the Eastern Hemisphere. In 1948 production was estimated to have been 136,000 tons. Production was still far below the prewar level of 345,000 tons, however.

Lard and unrendered hog fat production data are not available for most countries of Asia, Africa, and Oceania. In several Asiatic and North African countries religious beliefs prevent widespread production and consumption of hog lard. Small amounts of lard are usually imported for consumption by European-colony groups.

Hog fat production in China is believed to be large although no output statistics are available for that country. It is estimated at 120,000 tons for 1948. A large amount of the fat is eaten with the pork and used in ways other than as lard. Lard is produced in Africa in very limited quantities in the Union of South Africa, Angola, and Madagascar. The lard production in Madagascar has decreased from prewar levels. Production has dropped from approximately 1,000 tons prewar to about 250 tons in 1948. The number of hogs slaughtered in Japan has been increasing, but is still far below prewar. Lard production there is estimated at about 1,000 tons.

Australia and New Zealand are self-sufficient in regard to lard output. New Zealand production has increased steadily since the war and is estimated at 8,000 tons for 1948. Exports were over 6,000 tons in 1948. Normally, there is not a great demand for lard, because the population prefers other fats and vegetable oils. Hog numbers in 1948, estimated at 1,300,000 for Australia, and 545,000 for New Zealand were at prewar levels. Australian lard production has remained around 4,600 tons annually.

CURRENT CUBAN LARD AND TALLOW SITUATION

LARD

Cuban lard imports in the January-March period totaled about 37 million pounds, or an average of more than 12 million pounds per month. These receipts were more than double imports in the comparable period of 1948, and 70 percent larger than in the preceding quarter, October-December 1948.

All lard received in the last 3 months came from the United States. A very large part of the imports during the quarter arrived in the last 6 weeks of the period, after the United States export controls were removed. Prior to mid-February there was a lard shortage in Cuba, and many importers had ordered large quantities. They had opened irrevocable credits in advance, expecting that only a small part of the total quantities ordered would be licensed for shipment, but hoping, nevertheless, that they would receive generous amounts. Many of the purchase contracts were made at prices unjustified by the United States spot market quotations. When United States exports were decontrolled, exporters rushed to fill all orders on hand and claim the credits deposited in their favor. As a result, considerable quantities of lard were shipped to Cuba in late February and March which cost importers much more than lard purchased after the removal of export controls.

Consumption of lard during the first 3 months of 1949 is estimated at 22 million pounds, or 25 percent more than in the preceding quarter. Abundant supplies and greatly reduced prices, especially after decontrol

of exports from the United States, along with the increased seasonal demand that accompanies the sugar harvesting season, were responsible for the high rate of consumption. Cuban lard stocks, which on January 1, 1949 totaled 10.6 million pounds (about 45 days supply), increased to 26.5 million pounds at the end of March. This is probably enough to fill commercial "pipe lines", and provide for all consumption requirements until late June. Large receipts and a declining domestic market, where retailers refused to buy more than day-to-day requirements, have resulted in warehouse-stocks growing to unmanageable proportions. Domestic prices became competitive in mid-February when exports were decontrolled. Most of the time they were below the flexible ceilings allowed. Dealers, with stocks previously acquired, have had to sell at or below cost to meet the prices of currently arriving lard priced at 15 cents per pound, c.i.f. Habana. This lard wholesales generally at 18 to 20 cents.

Cuba probably will need to import only small quantities of lard in the second quarter because present stocks in dealers' hands are very large. The practice of many merchants is such, however, that if United States lard markets become firm or turn "bullish", local importers will buy regardless of their stocks on hand.

TALLOW

Tallow production in Cuba in the first 3 months of 1949, at approximately 3.8 million pounds, was larger than in comparable periods of recent years as a result of the relatively greater slaughter of beef cattle. The rate of tallow consumption by Cuban soap manufacturers during the first quarter was about 2.9 million pounds monthly, or 17 percent lower than that of the last months of 1948. Although Cuban manufacturers of soap have found raw materials in abundant supply during the quarter, they are having their difficulties, nevertheless. Their soap inventories, which are heavy, were made of expensive materials. Meanwhile, demand and prices for soap have dropped lower than had been anticipated.

Tallow imports during the first quarter are estimated at 5.7 million pounds, or 25 percent more than in the previous quarter. Large quantities were imported in February to take advantage of favorable prices, which had become low compared to levels existing throughout most of 1948. The decontrol of United States fats exports permitted free movement of supplies. As prices dropped in March to their lowest point since before the war, soap makers were forced to curtail purchases to prevent accumulation of excessive inventories. The quantity now on hand is estimated at between 2.8 and 3.0 million pounds or about 1 month's supply at current consumption rates. Such a ratio between stocks on hand and amount being used is quite normal in the Cuban soap industry.

Tallow prices in Cuba also declined steadily and rapidly during the first quarter. Prices of imported United States prime tallow fell from 13 to 14 cents per pound c.i.f. Habana in early January to 8 to 9 cents in mid-March. Since exports of United States tallow were decontrolled,

Cuban soapmakers have not had difficulties with exorbitant price demands for locally produced soap fats. Prices for locally produced tallow approximate the prices of imported tallow. Prices are lower than at any time since before the war, and now that raw material costs are down, soap prices are being cut sharply as manufacturers seek to spur consumption in order to increase the volume of their operations. Manufacturers report that sales are slow and that it is necessary to cut operations and inventories. Despite an increase in the domestic production of tallow in April and May, imports totaling about 5.5 million pounds of soap fats may be necessary during the second quarter.

CUBA: Monthly imports of lard, inedible tallow and grease; average 1943-46, and annual 1947-49. 1/

Month	Lard				Inedible Tallow and Grease			
	Average: 1943-46:		1947	1948	Average: 1943-46:		1947	1948
	Short tons	Short tons	Short tons	Short tons	Short tons	Short tons	Short tons	Short tons
Jan.	3,032	4,328	386	3,684	268	200	263	753
Feb.	3,033	3,194	2,876	8,250	52	1,022	1,419	1,548
March	2,351	1,515	5,111	2/6,600	411	876	1,498	550
April	3,347	1,949	1,174	-	772	562	406	-
May	2,474	5,206	4,626	-	1,609	1,273	2,212	-
June	3,008	2,326	3,306	-	786	1,852	647	-
July	4,443	2,968	3,510	-	530	1,178	1,144	-
Aug.	3,359	4,290	4,577	-	1,010	1,660	1,081	-
Sept.	3,399	1,727	1,767	-	737	580	732	-
Oct.	2,313	4,742	1,269	-	1,086	1,160	313	-
Nov.	2,429	5,019	5,019	-	406	924	604	-
Dec.	4,322	2,359	4,579	-	977	270	1,316	-
Total	37,560	39,623	38,320	-	8,664	11,537	11,637	-

1/ Revised data.

2/ Estimated.

Source: American Embassy, Havana.

DOMINICAN REPUBLIC'S 1948 FATS AND OILS
PRODUCTION APPROXIMATES 1947 LEVEL

Production of oleaginous materials in the Dominican Republic in 1948, with the exception of peanuts, continued at approximately the same level as in 1947, according to a report from the American Embassy, Ciudad Trujillo.

The peanut crop reached a record of 10,200 short tons compared with the former peak outturn of 10,020 tons in 1945 and almost 9,000 in 1947. During 1948 the Department of Agriculture, Livestock and Colonization began a planting campaign to increase the area of peanuts. The program met with little success, however, as the actual area planted (41,210 acres) was less than that of the year before (43,400). Growers reportedly lacked enthusiasm to expand acreage because of the lack of a price increase incentive and the inexperience in growing a crop little known by many farmers. Higher yields in 1948 than in 1947 were the result principally of more favorable growing conditions and, to a lesser extent, to increased use of mechanized equipment (tractors, plows, and harrows loaned by the peanut oil factory).

The Sociedad Industrial Dominicana, the only producer of peanut oil in the Dominican Republic, reported an output of 1,740 tons for the year 1948, compared with 1,020 tons in 1947 and 1,520 tons in 1946. Practically all of the peanut oil produced is sold in the domestic market; the small balance is exported.

Production of coconuts during 1948 is estimated at 17.0 million nuts compared with 12.9 million in 1947. Considerable interest in planting coconuts has been demonstrated by farmers in several agricultural districts during the past year. The area of greatest coconut planting and production is around Samana Bay, although in recent years increasing numbers of palms have been planted near San Cristobal and in the Central Cibao Valley. Only relatively insignificant quantities of coconuts are exported in nut or shredded form. Most of the output is consumed as food or expressed for oil for the domestic soap industry. The 1948 coconut oil output is unofficially estimated at 275 tons.

Sesame has been produced in the Dominican Republic for at least a decade, but little enthusiasm has been demonstrated among farmers for the cultivation of this crop. Production probably does not exceed 100 tons annually, and usually about half of the output is exported, mainly to Puerto Rico.

Hog lard, roughly estimated at 3,300 tons in 1948, is produced mainly from rural slaughter. Inedible tallow production is small, and supplies to meet the country's requirements are imported, mainly from Argentina.

The Dominican Republic produces between 90 and 95 percent of its total requirements of soap. Output in 1947 amounted to 5,900 tons.

Exports of fats, oils, and oilseed are insignificant, and except for sesame seed, they represent only a fraction of total production. Exports of sesame seed for 1947 and 1948 amounted to .53 and 67 tons, respectively.

The Republic has long been a net importer of fats and oils. Most of the tallow requirements are imported and have been supplied in the past principally from Argentina, the United States, and Uruguay. Lard imports have decreased in recent years, with the bulk of the requirements furnished by the Government-owned meat packing plant and the peanut oil factory.

PHILIPPINE REPUBLIC'S EXPORTS OF COPRA AND
COCONUT OIL CONTINUED TO INCREASE IN MARCH 1/

Exports of copra and coconut oil from the Philippine Republic again were greater than those of the preceding month.

Copra exports last month, at 42,150 long tons, were larger by 9 percent than the 30,655 tons shipped in February. In comparison with exports in March 1948, however, shipments from the Philippines last month were about one-fifth smaller.

PHILIPPINE REPUBLIC: Copra exports, March 1949 with comparisons
(Long tons)

Country 1/	Copra distribution					
	Average	1948 2/	Jan.-Mar.	March		
	1935-39	1948 2/	1949 2/	1948 2/	1949 2/	1949 2/
United States (total)...	206,801	364,102	54,084	26,760	20,690	
Atlantic Coast....	-	(61,618)	(10,297)	(-)	(-)	
Gulf Coast.....	-	(69,320)	(10,652)	(6,428)	(4,929)	
Pacific Coast....	-	(233,164)	(33,135)	(20,332)	(15,761)	
Canada.....	-	17,049	1,450	3,500	450	
Costa Rica.....	-	100	-	-	-	
Mexico.....	7,260	-	-	-	-	
Panama Canal Zone.....	-	707	320	-	-	
Panama, Republic of....	-	1,357	209	-	-	
Colombia.....	-	6,995	-	-	-	
Venezuela.....	-	3,868	1,133	-	-	
Austria.....	-	6,090	-	-	-	
Belgium.....	10	1,000	-	1,000	-	
Denmark.....	6,025	26,536	5,000	1,700	2,000	
France.....	24,589	65,912	15,407	3,900	8,900	
Bizonal Germany.....	7,309	17,250	7,000	-	4,086	
Italy.....	4,079	21,900	6,706	1,500	2,712	
Netherlands.....	28,415	8,944	1,050	-	-	
Norway.....	91	9,276	2,400	-	-	
Poland.....	-	31,742	1,500	12,500	1,500	
Sweden.....	4,183	4,743	1,000	2,478	1,000	
Switzerland.....	-	1,000	-	-	-	
Japan.....	1,047	24,339	-	-	-	
Syria.....	-	1,443	-	-	-	
Egypt.....	1,271	-	-	-	-	
Union of South Africa..	-	-	1,224	-	712	
Others.....	8,758	11,350	6,100	-	100	
Total.....	299,838	625,630	104,583	53,338	42,150	

1/ Declared destination. 2/ Preliminary.

Source: American Embassy, Manila.

1/ A more extensive statement may be obtained from the office of Foreign Agricultural Relations

Coconut oil shipments from the Republic totaled 4,178 tons in March. This represents an increase of slightly more than 60 percent from the 2,598 tons exported in February and somewhat less than 60 percent from the 2,673 tons shipped out in March the year before.

GRAINS, GRAIN PRODUCTS AND FEEDS

(Continued from Page 381)

SIAM'S RICE EXPORTS

INCREASE SHARPLY 1/

Rice exports of 900 million pounds from Siam during the first quarter of 1949 were up sharply from the 424 million pounds exported in the same quarter of 1948. Deliveries during the first week of April, continuing heavy, amounted to 97 million pounds as against 27 million pounds in the same week the year before.

Relatively heavy exports and increased purchases from growers thus far this season bear out early predictions that a large surplus from the 1948 crop would be available for export. The December 1 forecast of 2,750 million pounds for the exportable surplus is still considered reasonable. Current estimates by various Siamese Government and trade representatives vary from 1,870 to 3,300 million pounds.

SIAM: Rice shipments, January-March, 1949 with comparisons

Year	Quarter					Total
	January-	April-	July-	October-		
	March	June	September	December		
	Million pounds	Million pounds	Million pounds	Million pounds	Million pounds	
Average - 1936-40....	-	-	-	-	-	2,920
1947.....	221	283	134	151		790
1948.....	424	509	385	469		1,787
1949.....	900	-	-	-		1/ 2,750

1/ Export surplus.

American Embassy, Bangkok.

Total new-crop (1948-49) purchases from producers up to March 20 approximated 1,870 million pounds. Purchases, first made on December 1, have averaged over 470 million pounds a month.

1/ A more extensive statement may be obtained from the Office of Foreign Agricultural Relations.

COTTON AND OTHER FIBERCOTTON - PRICE QUOTATIONS
ON FOREIGN MARKETS

The following table shows certain cotton-price quotations on foreign markets converted at current rates of exchange:

COTTON: Spot prices in certain foreign markets, and the
U.S. gulf-port average

Market location, kind, and quality	Date 1949	Unit of weight	Unit of currency	Price in foreign currency	Equivalent U.S. cents per pound
Alexandria		:Kantar	:	:	:
Ashmouni, Good	4-21	: 99.05 lbs.	:Tallari	: 47.40	: 39.55
Ashmouni, F.G.F.....	"	: "	: "	: 45.40	: 37.88
Karnak, Good.....	"	: "	: "	: 67.95	: 56.70
Karnak, F.G.F.....	"	: "	: "	: 62.70	: 52.32
Bombay		:Candy	:	:	:
Jarila, Fine.....	"	: 724 lbs.	:Rupee	: 620.00	: 23.86
Breach, Fine.....	"	: "	: "	: 650.00	: 25.01
Kampala, East African.....	"	: "	: "		(not available)
Karachi		:Maund	:	:	:
4F Punjab, S.G., Fine.....	4-20	: 82.28 lbs.	: "	: 88.00	: 32.27
289 F Sind, S.G., Fine.....	"	: "	: "	: 95.00	: 34.83
289F Punjab, S.G., Fine.....	"	: "	: "	: 98.50	: 36.11
Buenos Aires		:Metric ton	:	:	:
Type B.....	4-21	: 2204.6 lbs.	:Peso	: 3400.00	: 45.92
Lima		:Sp. quintal	:	:	:
Tanguis, Type 5.....	4-20	: 101.4 lbs.	:Sol		(not quoted)
Pima, Type 1.....	"	: "	: "		(not quoted)
Recife		:Arroba	:	:	:
Mata, Type 4.....	4-21	: 33.07 lbs.	:Cruzeiro	: 215.00	: 35.37
Sertao, Type 5.....	"	: "	: "	: 205.00	: 33.73
Sao Paulo		:	:	:	:
Sao Paulo, Type 5.....	"	: "	: "	: 205.00	: 33.73
Torreon		:Sp. quintal	:	:	:
Middling, 15/16".....	"	: 101.4 lbs.	:Peso	: 192.00	: 27.15
Houston-Galveston-New		:	:	:	:
Orleans av. Mid. 15/16"....	"	:Pound	:Cent	: XXXXX	: 32.89
		:	:	:	:

Quotations of foreign markets reported by cable from U. S. Foreign Service posts abroad. U.S. quotations from designated spot markets.

COTTON CROP ESTIMATE IN INDIA
REVISED DOWNWARD

The 1948-49 commercial cotton crop in India is now estimated by official and private sources at 1,715,000 bales (of 500 pounds gross weight), according to a report from Henry W. Spielman, American Consul at Bombay. After adding about 225,000 bales for cotton used by home industries the total of 1,940,000 bales is 110,000 less than the latest previous estimate published by this Office and 23 percent less than the 1947-48 crop of 2,510,000 bales.

The present cotton shortage in India is becoming a matter of serious concern to mill owners and the cotton trade. Representatives of these interests are convinced that the 1948-49 Pakistan crop did not exceed 850,000 equivalent bales and expect that it will be impossible to obtain the 542,000 bales allocated by the Pakistan Government for export to India during the year ending August 31, 1949. The Pakistan Government recently agreed to sell between 62,000 and 83,000 bales to Japan (no previous quota) and has issued export permits for about 335,000 bales to other countries. Importers in India do not expect to receive during the 1948-49 year more than 400,000 bales of the remaining surplus of 450,000. This estimate, based on a reduced crop estimate, may be too optimistic in view of domestic requirements of about 150,000 bales.

Indian Government officials have repeatedly denied rumors of any attempt to obtain dollars through any form of loan for the purchase of American cotton. Interest in Egyptian cotton has been keen since the decline in prices, and sizable orders were placed in recent weeks. Importers are also hoping to obtain some cotton from the crops now being harvested in South Brazil and Argentina where expenditure of dollar exchange would not be necessary.

In order to conserve the scarce supply of Indian cotton without restricting the receipts of dollar exchange, the exportation of cotton from India to all soft currency areas has been prohibited since March, 1949. Three mills in Ahmedabad were closed early in April awaiting the arrival of cotton, and several others had announced that the second and third shifts will be stopped after April 15. Transactions on the Bombay spot market rarely exceeded 300 running bales a day recently and practically no trading was done on the futures market in March. Black market activity in seed cotton and to some extent in baled cotton was reported to be increasing in most cotton areas.

Statistics issued by the Government earlier this year anticipated a 1948-49 crop of 1,880,000 bales (of 500 pounds gross) which, when added to the carry-over of 1,430,000 bales at the beginning of this season and expected imports of 540,000 from Pakistan, would make an available supply of 3,850,000 bales of Indian and Pakistan cotton against expected requirements of 2,940,000 bales during the year. Exports were expected to total about 245,000 bales and about 325,000 were estimated as unfit for mill consumption, leaving a probable carry-over of about 325,000 bales of spinnable cotton of these types on August 31, 1949. The production

and import (Pakistan) figures were subsequently reduced, as explained earlier, so supplies of these types of cotton may be down to less than 2-months' requirements by the time the 1949-50 crop becomes available.

Imports from Pakistan, soft currency areas, and sterling areas (except East Africa and the Sudan) are unrestricted. The Government is purchasing East African and Sudan cotton on its own account under a joint agreement with the British Government. These purchases, expected to total nearly 250,000 bales together with possible small imports from other sources and normal imports of about 250,000 bales together with possible small imports from other sources and normal imports of about 250,000 bales from Egypt, may enable the mill industry to maintain operations near the present level until the new Indian crop arrives on the market.

BELGIAN COTTON CONSUMPTION RUNNING BELOW LAST SEASON 1/

Cotton consumption recovered somewhat from the low point of November and December, but for the first 6 months of the current season (August through January) consumption is still running 14 percent under the same period of the 1947-48 season. The domestic textile market is reported saturated, and in view of present difficulties in exporting to most countries the industry probably cannot expect any improvement soon. The 10 to 20 percent decline in cotton goods prices during 1948 reflects the weakening of demand.

Belgian cotton consumption in 1947-48 reached 421,000 bales but will probably fall below 370,000 bales in 1948-49. In prewar years cotton consumption averaged 356,000 bales annually, of which about 40 percent was used to produce goods for the export market. With textile production above prewar levels Belgium must export an even larger share of its total production.

Exports of cotton textiles have been increasing steadily but have not reached prewar levels. This high production, with low exports, and slackening of domestic demand have resulted in the accumulation of large textile stocks over the past year. In addition, imports of cotton textiles have been above prewar, which has led to strong protests from the industry. Protest also has been made to the Belgian Government regarding the nonobservance by some countries of the provisions in bilateral commercial treaties providing for the export of textile products. It is claimed that several countries have not only reduced the imports of textiles below the volumes specified under signed agreements, but that in some cases they ignore them completely due to an alleged lack of Belgian francs.

1/ Based on reports of Jerome T. Gaspard, Agricultural Attaché, Chalmers B. Wood, Third Secretary, and Ruffin L. Noppe and Florent N. Thonus, Clerks, American Embassy, Brussels, Belgium.

The Belgian Federation of Textile Industries states that the difficulties encountered by Belgium in exporting textile products are mainly due to the following reasons:

1. Shortage of Belgian francs in many countries and the inconvertibility of several currencies;
2. Countries which previously purchased from Belgium have now expanded their own textile industries and no longer depend on imports to fill their requirements;
3. High tariffs in effect in certain countries which hinder Belgian export trade.

Imports of raw cotton have been increasing and stocks have been rebuilt to the normal level of more than 3-months' supply. The increase in imports was due largely to greater arrivals from the United States. In January and February of 1949 about two-thirds or 43,000 bales of Belgian imports came from the United States, as compared to only 25 percent in the 1947-48 season. In the first 7 months of the current season the United States has shipped 97,000 bales of cotton to Belgium, as compared to only 53,000 bales during the entire 1947-48 season. None of these cotton shipments have been financed by the Economic Cooperation Administration. Belgium received its first E.C.A. procurement authorization in March 1949 for 1,000 bales.

GREEK COTTON CONSUMPTION CONTINUES AT HIGH LEVEL 1/

Cotton consumption in Greece is being maintained at about the same level as that of the past 2 years, or about 85,000 bales annually. The domestic cotton crop supplies about 60 percent of Greece's raw cotton requirements and about 40 percent is imported. Brazil and Egypt have been supplying most of Greece's imports in the past, but imports of United States cotton financed by the Economic Cooperation Administration have been increasing. In the first 5 months (August through December 1948) of the current season, Greece imported 4,904 bales from Brazil, 3,716 bales from Egypt, and 894 bales from the United States. Imports from India and Pakistan, formerly important sources of supplies, have dwindled and in the first 5 months of the current season amounted to only 370 bales.

The United States has authorized the shipment of 20,000 bales under the European Recovery Program. Most of this is still to be shipped and should meet most of the 20,000-bale import requirement for the remainder of the 1948-49 season.

1/ Based on reports by Jay G. Diamond, Agricultural Attaché, and Charles R. Tanguy, Third Secretary, American Embassy, Athens.

Greece is attempting to increase cotton production by maintaining prices at favorable levels and restricting imports. The 53,000-bale crop in 1948, however, is far below the 1935-39 average of 76,000 bales annually. Imports have been restricted as a matter of Government policy in order both to save foreign exchange and to insure full utilization of the domestic crop and payment of a fair price to farmers. Cotton mills, in order to be eligible for the issuance of import licenses, are required by law to purchase 30 percent of the domestic crop by the end of November, another 40 percent in December, January, and February, and the final 30 percent between March 1 and May 31.

The Greek Government has not established a farm "security" price for cotton as for other principal crops but by restricting imports maintains prices at favorable levels. Prices paid to farmers are now relatively higher than those of most other crops. These favorable prices, in addition to a decline in acreage normally sown to winter grains and a good demand for cotton seed, should encourage farmers to make greater efforts to increase their cotton acreage this year.

The outlook for increased consumption is uncertain and depends on the possibility of increasing the purchasing power of the Greek people.

There are considerable stocks of cotton goods on hand in factories and shops, and it seems doubtful that cotton consumption by spinning mills will increase in this crop year.

The long-range outlook for increased cotton cultivation in Greece is very favorable and may reach the Government goal of 375,000 acres by 1953. This is over three times the 1948 area and above the prewar peak of 205,000 acres planted in 1937.

The Government is giving much attention to increasing yields by bringing a larger percentage of cotton acreage under irrigation, by distributing and otherwise encouraging the use of improved and more productive varieties of seeds, by controlling insect pests, and by modernizing ginning facilities.

Present plans for construction of the principal dams and canals needed for irrigation of cotton and other crops are based on expected financing by the Greek Government with E.C.A. aid. The farmers are being encouraged to organize themselves or make use of existing cooperatives for such purposes as undertaking construction projects and financing necessary expenditures. In several areas these programs have already been put into action and irrigation projects have been started.

All of these factors and the fact that cotton provides the farmer with a relatively satisfactory income combine to make an encouraging long-range outlook for cotton cultivation in Greece.

**JUTE SUPPLY
CONTINUES SCARCE**

The 3-billion pound jute crop (according to the latest official estimate) that was produced in India and Pakistan in 1948 is 380 million pounds less than the prewar (1935-39) average of 3.4 billion pounds, and far below the peak crop of 5.3 billion pounds produced in 1940. The reduced output in 1948 is due to damage by high water both in India and Pakistan. Some of the lower areas reported as much as 25 percent loss. Losses occurred not only in reduced quantity but in a lower quality of the fiber.

**JUTE: Area and production in India and Pakistan,
average 1935-39 to calendar year 1948**

Calendar years	Area	Production	Calendar years	Area	Production
	: acres	: 1/ Million pounds		: acres	: 1/ Million pounds
Average:			Years:		
1935-39....	2,856.4	3,382.6	1946.....	1,910.9	2,259.1
(Year) 1940..	5,668.8	5,274.6	1947.....	2,710.5	3,415.4
1941-45....	2,531.6	2,858.7	1948.....	2,642.2	3,002.3
1946-48....	2,421.2	2,892.3			

1/ Includes imports from Nepal.

Office of Foreign Agricultural Relations. Compiled from official all-India forecasts published by the Director of Agriculture, Bengal.

Although production reached 3.4 million pounds in 1947 the 4 preceding crops had been so small that they averaged only 2.7 million pounds annually. Wartime production (average 1941-45) was less than 2.9 million pounds annually, or only about 85 percent of the prewar average, and postwar production has averaged only 86 percent of the prewar figure. Production in 1949 has been forecast by trade sources in India at about 2.4 million pounds in Pakistan and 0.84 million in India, making a total of about 3.24 million pounds from the combined areas.

India and Pakistan together produce most of the world supply of raw jute, but of the 2 countries Pakistan in 1948 had 71 percent of the combined area and 73 percent of the combined production. Since the separation of the 2 countries, the Government of India has succeeded in increasing production in its area. The 1948 crop was a third greater than the 1946 production. The 1948 crop in Pakistan is nearly a third larger than the small crop of 1946 but, due largely to floods, it is 20 percent smaller than the 1947 crop.

JUTE: Area and production in India and Pakistan,
1946 to 1948

Area and production	:	1946	:	1947	:	1948
Area (thousand acres):	:	:	:	:	:	
Pakistan.....	1,373.6	:	2,053.7	:	1,876.6	
India 1/.....	537.3	:	651.8	:	765.6	
Total.....	1,910.9	:	2,710.5	:	2,642.2	
Pakistan as percent of:						
total.....	71.9	:	76.0	:	71.0	
Production (million pounds):	:	:	:	:	:	
Pakistan.....	1,651.2	:	2,737.0	:	2,191.7	
India 1/.....	607.9	:	678.4	:	810.6	
Total.....	2,259.1	:	3,415.4	:	3,002.3	
Pakistan as percent of:						
total.....	73.1	:	80.1	:	73.0	

1/ Includes imports from Nepal which were estimated at about 80 million pounds in 1946, more than 15 in 1947, and nearly 18 in 1948.

Office of Foreign Agricultural Relations. Compiled from official all-India forecasts published by the Director of Agriculture, Bengal.

The largest consumers of raw jute are the jute goods manufacturing mills in Calcutta. By agreement Pakistan will deliver 2 million pounds to these mills during the 1948-49 crop year against India's agreement to purchase that amount. At the end of December 1948 the mills reported they had purchased 75 percent of the amount agreed upon but deliveries were lagging considerably behind schedule.

Stocks of raw jute in Calcutta were reported to be at the low figure of 600 million pounds at the end of March 1948 compared with 790 million at the corresponding time in 1947. During the third quarter of 1948 stocks dropped to only 412 million pounds. Although 719.6 million pounds were reported on hand at the end of December, the supply was still quite low.

Exports of raw jute from Calcutta in the last quarter of 1948 were only 80.4 million pounds, compared with 219.2 million and 177.4 million in the corresponding periods of 1947 and 1946, respectively. Exports from Chittagong, a Pakistan port, were estimated at 93.2 million pounds in the last quarter of 1948. Corresponding data for preceding years are not available, but a total of 305.8 million pounds was exported during the year ended March 31, 1948.

Production of manufactured jute goods in India has held up well compared with what raw jute supplies might indicate. Output during the last quarter of 1948 amounted to 3,537 million pounds, compared with

3,508 and 2,950 million pounds during the corresponding quarters of 1947 and 1946, respectively. Output during the 1947-48 jute year totaled 13,825 million pounds, 12,858 million pounds in 1946-47, and 14,493 million pounds in 1945-46.

Because of the continued short supply and low mill stocks of raw jute, sealing of 12-1/2 percent of the hessian looms in India has been under consideration, but current unofficial reports in the United States indicate that the Government of India has rejected the proposal at least for the present time.

TROPICAL PRODUCTS

DOMINICAN REPUBLIC'S 1948 CACAO EXPORTS AND 1948-49 PRODUCTION LOWER

The Dominican Republic's cacao exports of 56,705,000 pounds for the 1948 calendar year show a decline of about 14 percent from the record 1947 exports of 66,134,000 pounds but were still slightly higher than the 1935-39 annual average of 54,048,000 pounds. The total 1948-49 cacao production in the Dominican Republic is now estimated at about 60 million pounds, slightly less than the 1947-48 production of 62 million pounds but still above the annual average of 54 million pounds for the period 1935-39, according to the American embassy in Ciudad Trujillo.

DOMINICAN REPUBLIC: Exports of cacao beans in 1948, with comparisons

Destination	: Average :	1946	1947	1948 1/
	: 1935/39 :			
	: 1,000 :	1,000	1,000	1,000
	: pounds :	pounds	pounds	pounds
United States.....	50,688	46,894	63,926	53,506
Other Western Hemisphere.....	324	7,736	879	128
Europe.....	2,655	824	1,529	3,071
Other.....	381	94	-	-
Total.....	54,048	55,548	66,134	56,705

1/ Preliminary.

SOURCE: Dominican Customs Receivership, Exportacion de la Republica Dominicana, and U.S. Foreign Service reports.

About 94 percent of the Dominican Republic's 1948 exports went to the United States and practically all of the balance to the Netherlands. In the prewar period 1935-39, the United States also took 94 percent of the cacao exported from the Dominican Republic, and Germany took most of the balance.

Important changes were effected in the Dominican Cacao industry in 1948. A \$2.5-million dollar chocolate processing plant was completed at Puerto Plata early in the year. The plant was purchased by the Dominican Government in March 1948 and the manufacture of chocolate for export began later in the year. The Dominican Government hopes that most of the cacao beans produced in the country can be processed into chocolate for export, and that total returns to the country will be increased substantially. Production and export of chocolate in 1948 has not been very encouraging. A large export outlet did not develop as importers tended to prefer beans rather than chocolate. Further difficulties were encountered as a result of price declines between the time beans were purchased and chocolate was processed for export. Under these conditions, profits on exports of chocolate were limited.

Export duties on cacao beans were increased substantially in March and again in December 1948. Increases were for the purpose of obtaining additional revenue and resulted in lower prices to growers. Prices paid to growers reached a peak of 33 cents a pound in February 1948, but dropped in March following enactment of higher export duties. They continued to decline during the year partly as a result of lower world prices for cacao beans and reached a low of 10 1/2 cents per pound in December following the second increase in export duties.

MEXICAN 1948 COFFEE EXPORTS LOWER;
1948-49 PRODUCTION HIGHER

Mexico's 1948 calendar year exports of 520,661 bags of green coffee fell 5 percent below the 1947 exports of 547,805 bags and 13 percent below the 1935-39 prewar annual average of 599,210 bags. Estimates of the 1948-49 total coffee production range from 1,000,000 to 1,108,000 bags, as compared with the 1947-48 production of 923,000 bags and the 1935-39 annual average of 959,000 bags, according to the American Embassy in Mexico.

Total 1948 exports of green coffee from Mexico were the lowest for any calendar year since 1942. The United States received more than 99 percent of Mexican coffee exports in 1948. The most important European buyers were the Netherlands, Italy, Sweden, and Belgium. In the prewar years, 1935-39, 62 percent of Mexican coffee exports were to the United States and 38 percent to Europe, principally Germany.

Weather conditions in the 1948-49 season were excellent in Mexico's coffee producing districts. A bumper 1948-49 coffee crop is being harvested and the exportable surplus is forecast at between 685,000 and 750,000 bags. The large 1948-49 crop is due to the unusually favorable season, as in general yields per coffee tree have been declining steadily since 1936. Quality of coffee has also dropped. To correct this situation the Ministries of National Economy and Agriculture recently announced a program to create a National Coffee Institute which will concentrate on promoting and improving coffee production in Mexico.

MEXICO: Exports of green coffee in 1948, with comparisons

Destination	Average	1946	1947	1948
	1935-39		1/	1/
	Bags	Bags	Bags	Bags
United States.....	369,406	526,525	528,414	518,807
Europe.....	228,747	21,065	19,315	1,821
Other.....	1,057	7,538	76	33
Total.....	599,210	555,128	547,805	520,661

1/ Preliminary.

SOURCE: Anuario Estadistico del Comercio Exterior and U.S. Foreign Service Reports.

TOBACCOBRAZIL'S TOBACCO
EXPORTS DECLINE

Brazil's exports of leaf tobacco in 1948 totaled 54.8 million pounds, or about 34 percent less than the 82.9 million pounds exported in 1947, according to the American Consulate in Porto Alegre. The 1948 exports were 53 percent below the record exports of 116.6 million pounds in 1946 and 23 percent below the prewar, 1935-39, annual average exports of 71.0 million pounds.

During 1948 the most important outlets for Brazilian leaf were Argentina, Spain, and the Netherlands. These countries took 14.2 million pounds, 12.7 million pounds and 9.1 million pounds, respectively. Germany, the most important prewar outlet for Brazilian leaf, entered the market for the first time since 1940 and took 3.9 million pounds. This compares with prewar, 1935-39, average annual exports to Germany of 30.4 million pounds. Other countries taking Brazilian leaf in 1948 include Uruguay, Belgium and Luxembourg, Denmark, Switzerland, and France.

BRAZIL: Exports of leaf tobacco, 1948 with comparisons

Country of Destination	Average	1946	1947	1948
	1935-39			
	1,000	1,000	1,000	1,000
	pounds	pounds	pounds	pounds
Argentina.....	11,037	8,704	10,086	14,151
Uruguay.....	2,394	2,180	2,022	2,485
Belgium and Luxembourg.....	1,441	1,764	6,122	1,206
Denmark.....	1/	8,510	3,413	3,909
France.....	1,680	23,869	14,905	483
Germany.....	30,376	-	-	3,944
Netherlands.....	18,247	12,906	10,093	9,140
Spain.....	1/	38,422	17,017	12,718
Switzerland.....	1/	7,253	5,362	2,806
Other Countries.....	5,851	9,978	13,840	3,947
Total.....	71,026	116,586	82,860	54,789

1/ Included in "Other Countries."

Source: Brazilian Federal Ministry of Finance.

FRANCE'S TOBACCO ACREAGE AND
PRODUCTION; IMPORTS REDUCED

France's 1948 tobacco crop is estimated at about 9 percent below the record 1947 crop, according to the American Embassy in Paris. The area planted to tobacco in 1948 was about 11 percent below 1947, but the 1948 yield per acre was larger. Leaf imports in 1948 were sharply reduced, being 59 percent below 1947.

The 1948 tobacco crop, which is now being delivered to the French Government Monopoly, is estimated at 105.0 million pounds, farm sales weight, compared with the record 1947 crop of 115.1 million pounds and the prewar, 1930-39, annual average of 72.2 million pounds. The reduction in the 1948 crop was due to a decrease in acreage which apparently occurred from the elimination of premium prices formerly paid to growers who maintained or increased production.

The area planted to tobacco in 1948 is placed at 64,090 acres, compared with 71,985 acres in 1947 and an annual average of 42,500 acres in the 1930-39 period. The 1948 yield per acre of 1,637 pounds was the largest in several years and was primarily due to very favorable weather during the growing season.

FRANCE: Area, yield per acre and production of tobacco,
1948 with comparisons

YEAR	Area		Yield		Production
	1,000	acres	per	acre	
			Pounds		
Average					
1930-39.....	42.5		1,695		72,216
1946.....	60.7		1,481		89,932
1947.....	72.0		1,597		115,062
1948 1/.....	64.1		1,637		104,939

1/ Preliminary.

Source: French Tobacco Monopoly.

Leaf imports in 1948 totaled 26.1 million pounds, compared with 68.5 million pounds in 1947 and an annual average of 81.4 million pounds in the prewar, 1930-39, period. Algeria supplied 10.5 million pounds, or about 37 percent of France's leaf imports in 1948. Other countries supplying substantial quantities of leaf in 1948 include Turkey, Greece, Bulgaria, Brazil and Colombia. Imports from the United States are reported at less than 1.0 million pounds in 1948, compared

with 13.6 million pounds in 1947 and an annual prewar average of 29.7 million pounds in the 1930-39 period.

COSTA RICA'S TOBACCO PRODUCTION LARGER; IMPORTS DECLINE

Costa Rica's 1948-49 tobacco production increased and 1948 tobacco imports declined from the previous year's levels, according to the American Embassy in San Jose. The decline in imports was due to Government restrictions on the use of foreign exchange for the purchase of tobacco, and this situation probably helped to stimulate domestic production.

The country's 1948-49 tobacco harvest is estimated at 2.8 million pounds, compared with about 2.5 million pounds in 1947-48 and an annual average of about 1.7 million pounds during the preceding 5-year period, 1942-43 through 1946-47. About 99 percent of the 1948-49 crop was suncured leaf and about 1 percent flue-cured. This is the first year that flue-cured tobacco has been grown commercially in Costa Rica.

Leaf imports totaled 77,600 pounds in 1948, compared with 94,900 pounds in 1947 and an annual average of 122,800 pounds during the preceding 5-year period, 1942-46. A total of 70,600 pounds, or about 91 percent of the 1948 leaf imports were of United States origin. The remaining 7,000 pounds came from the Eastern Mediterranean area.

The country's 1948 cigarette imports totaled about 54.9 million pieces, compared with about 68.0 million pieces in 1947 and an annual average of about 50.0 million pieces during the preceding 5-year period. Practically all 1948 cigarette imports were from the United States.

FRUITS, VEGETABLES AND NUTS

APPLE AND PEAR CROPS HIGHER IN ARGENTINA

The first indicated production of the 1948-49 crop of apples and pears in Argentina is placed at 8.9 and 5.1 million boxes, respectively. The estimated production of 8.9 million is a little more than double last year's crop of 4.4 million and will be the largest crop on record. The pear crop of 5.1 million is 54 percent above the previous year's crop of 3.3 million and 109 percent above the prewar average of 2.4 million. Production, stimulated by favorable growing conditions in the irrigated district of the Rio Negro Neuquen Valleys, is estimated at 9.5 million boxes of apples and pears almost 4 times as much as was produced during the previous season.

Fruit from Argentina will be exported principally to Venezuela and Belgium and a limited amount to the United States.

Production of apples and pears in Argentina
1946-48

ZONE	Apples			Pears		
	1946-47	1947-48	1948-49	1946-47	1947-48	1948-49
<u>1,000 boxes</u>						
Rio Negro :						
Neuquen....:	3,927	1,167	6,013	2,718	1,243	3,507
Buenos Aires:						
Santa Fe...:	1,693	1,658	1,754	1,448	1,498	1,002
Merdoza, San:						
Juan.....:	1,352	1,208	802	412	416	401
:	:	:	:	:	:	
Others.....:	201	361	375	147	170	201
Total.....:	7,173	4,394	8,944	4,725	3,327	5,111

Apple and pear shipments through April 4 from Argentina to the United States are as follows: apples 500 boxes, pears 252,819 boxes, and grapes 24,015 boxes. In addition approximately 50,000 boxes of pears and a few boxes of apples are under treatment for later shipment.

APPLE CROP LARGER IN SWITZERLAND

The 1948 apple crop in Switzerland has been revised and is now indicated to be 30.3 million bushels, about the same as in 1946 but 74 percent above the small crop of 17.5 million in 1947. The pear crop of 9.7 million bushels is 42 percent below the 1947 crop of 16.8 million but slightly larger than the prewar crop.

The apple and pear crops were damaged by scab called "tavelure" in Switzerland. In most of the orchards from 70 to 80 percent of the 1948 crops were affected.

The cherry crop now estimated at 47,000 short tons is 32 percent below last year's crop of 69,000 but 88 percent above the 1935-39 average of 25,000. Continuous rains in June and July damaged the cherry crop, resulting in much of it being used for distilling fruit alcohol. Plums estimated at 32,000 tons are about the same as in 1946 and 1947, and apricots at 4,000 tons are 11 percent above last year's crop of 3,600 tons.

Switzerland exported 3.8 million bushels of apples and pears in 1948, of which Germany and Belgium received 72 percent or 1.4 and 1.1 million, respectively.

**AUSTRALIAN 1949 RAISIN AND
CURRENT FORECAST LOWERED**

The 1949 preliminary forecast of raisin production in Australia has been lowered to 53,200 short tons compared with 70,100 tons in 1948 and 50,500 tons in 1947. The present forecast consists of 47,000 tons of Sultananas and 6,200 tons of Lexias. The forecast is 28 percent below the 5-year (1942-46) average of 73,600 tons and 25 percent below the 10-year (1937-46) average of 71,100 tons. The currant forecast has been lowered to 20,200 tons compared with 19,300 tons in 1948 and 12,700 tons in 1947. This is 9 percent below the 5-year (1942-46) average of 22,300 tons and 12 percent below the 10-year (1937-46) average of 22,900 tons.

Early in the season it was anticipated a better-than-average crop would be produced. This was based on an anticipated shortage of gasoline for trucks which would take fresh grapes to wineries and would, therefore, direct grapes to drying. Late in February and early March heavy rains and high humidity did considerable damage in the Murray Valley. Damage was particularly bad at Mildura. Fortunately for growers in the area, most of the currants had been harvested. The damage was largely to Sultananas which were still being harvested. There was a small loss of Lexias.

The heavy reduction in production will reduce the amount available for export to the United Kingdom, Canada, and New Zealand. These countries will find it necessary to fill a larger percentage of their needs in other producing countries of the world.

EXPORTS OF PALM OIL AND PALM KERNAWS ---(Continued from Page 377)

Exports of kernels from British Malaya in 1948 totaled 7,249 tons. Nearly one-fourth more than the quantity shipped in 1947, exports in 1948 were about one-tenth less than the volume exported in prewar years.

Palm kernels exported from Indonesia in 1948 totaled 10,850 tons. This was considerably more than the 1,758 tons shipped out in 1947 but was only about one-fourth as great as the average quantity exported in prewar years.

This is one of a series of regularly scheduled reports on world agricultural production and trade prepared by the Office of Foreign Agricultural Relations Committee on Foreign Crop and Livestock Statistics. For this report, the Committee was composed of Joseph A. Becker, Chairman, C. M. Purves, Olav F. Anderson, Regina H. Boyle, Helen Francis, Mary E. Long and John E. Hobbes.

L A T E N E W S

The 1948-49 cotton crop in Haiti suffered heavy damage from boll weevils and amounted to less than 6,000 bales (of 500 pounds gross) compared with 10,600 last year. Mill consumption (1 mill) in 1948 amounted to 800 bales and 200 to 300 bales were consumed in making mattresses and other handicraft items. The mill is expected to consume 1,700 bales in 1949. Exports in 1948 totaled 9,300 bales including 3,600 to the United Kingdom, 3,300 to Belgium, 1,300 to France and 1,100 to the Netherlands. Only about 400 bales remained in stock at the end of 1948.

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